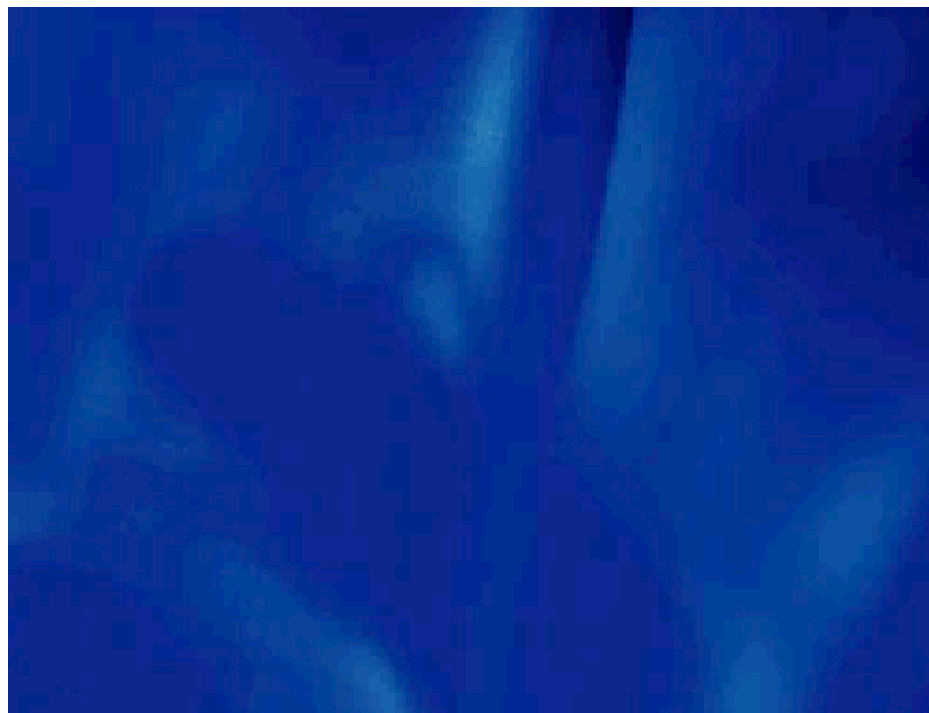


# *laada*

Documentation



## ACKNOWLEDGMENTS

Work began in September 1999 on the Jacada Graphical User Interface (GUI) conversion of the mainframe systems. From weekly meetings to occasional weeklong meetings, whether there would be intense testing phases or just meeting the deadlines for certain tasks, the user-group expressed professionalism and support throughout the duration of this project. A special thanks is extended to all those who dedicated their time and efforts in making this project a success. Below is a list of the Governor's Office of Technology and Revenue personnel involved.

### GOT

Gary Johnson, Mike Jull, Jeanne Lanz, and David Mahoney.

- Susan Byers, Gargi Chattergee, Levina Kamentz, and Susan Quarles.

### REVENUE–Teams

#### CAR

Deborah Barnes, Carolyn Blankenship, Bob Brooks, Pam Carpenter, Leslie Cheatham, George Cottrell, Debbie Dunn, Elizabeth Engler, Sheila Glass, Pat Goins, Anna Guion, Nick Harren, Mike Harrod, Deborah Huff, Debbie Johnson, Linda Lannert, Darlene Hembree, Jackie Lynn, Bonnie Moore, Cindy Murphy, Valerie Smoot, Doug Upton, Tammy Watts, Karen Wise, Kevin West, and Mary Ann Young.

#### JV

Jesse Alexander, Barbara Ayers, Bob Brooks, Rob Carter, Debbie Dunn, Etta Hill, Debbie Johnson, Sue Marshall, Gwen Miller, Bonnie Moore, Linda Sanford, Ainsley Snyder, Margaret Stewart, Lois Sullivan, Debbie Travis, and Matt Warfield.

#### OSCAR

Sheila Ashley, Cindy Baker, Alta Mae Core, Laurie Donovan, Chris Fasoldt, Shellee Hein, Greg Hensley, Cindy Howard, Yvonne Jackson, Jackie Lynn, Keith Raisor, Jimmy Todd, Vickie Varner, Charlie Werder, and Mary Ann Young.

- **DOIT** - Carla Hawkins
- 1. **Application Analysis and Support**– Larry Brown, Jennifer Cheek, Sherry Gibson, Ron Gordon, Debra Howard, and Beverly Yount.
- 2. **Application Planning and Development**–Leslie Cheatham, James Koontz, Cathy Marlett, and Carlos Sams.
- 3. **Security**–Roger Brewer and Bonnie Walton.
- 4. **Network Services**–Jim Lydon and staff.
- **Public Information**–Alice Bryant, Sarah Gilkison, Betty Sanford, and LaDonna Ware.
- **Division of Collections**–Laurie Donovan

# TABLE OF CONTENTS

1.1	Overview	
1.1.1	History	
1.1.2	General Overview	
1.1.3	System Features	
1.1.3.1	Changing System Resolution	
1.2	Introduction	
1.2.1	Logon	
1.2.2	Logoff	
1.2.3	Security	
1.3	Navigation	
1.3.1	Title Bar	
1.3.2	Task Bar	
1.3.3	Menu Bar	
1.3.4	Tool Bar	
1.3.5	Bubble Help	
1.3.6	One to Many	
1.3.7	Many to One	
1.3.8	Checkbox	
1.3.9	Drop Down Menu	
1.3.10	Floating Menu	
1.3.11	List Box	
1.3.11.1	List Box with Checkbox Selection	
1.3.11.2	List Box with Floating Menu Selection	
1.3.11.3	List Box with Drop Down Menu Selection	
1.3.11.4	List Box with Pushbutton Selection	
1.3.11.5	List Box with Line Selection	
1.3.12	Drop Down Calendars	
1.3.13	Hyperlink	
1.3.14	Pushbutton	
1.3.15	Command Buttons	
1.3.16	Definitions of Command Buttons and Pushbuttons	
1.3.17	Using the Mouse	
1.3.17.1	Changing Your Mouse Settings	

## APPENDICES

### APPENDIX 1. Discrepancies

- (a) Instructions for Handling Error Messages
- (b) How to Report a Problem
- (c) Discrepancy Report Form

### APPENDIX 2. Commonly Asked Questions

### APPENDIX 3. Index

## 1.1 OVERVIEW

*“We should all be concerned about the future because we will have to spend the rest of our lives there.” – C. F. Kettering*

### 1.1.1 History

New technological developments are constantly sought to bring better tools for users to perform their work. Many companies still rely on old mainframe setups because rewriting existing programs can be costly and time-consuming. The Kentucky Revenue Cabinet (KRC) was seeking a company that would allow a quick and easy way to join the Internet wave to increase efficiency.

Jacada, Inc. was selected to provide KRC with a software program that acts as a translator on a corporate Web server. Users can access mainframe data through the corporate Web site (RevWeb), and the program automatically converts mainframe systems into a Net-friendly format. There are over 600 enterprises worldwide including Enterprise Rent a Car, Lillian Vernon, Caterpillar, Saab, Porsche, and Bank of America that are using this same product. For more information about this company, visit <http://www.jacada.com/>.

The Department of Information Technology (DOIT) in conjunction with the Governor's Office of Technology (GOT) will be utilizing the software to convert many, if not all the Revenue mainframe systems. The Compliance and Receivables system (CAR), consisting of 236 screens, was chosen first because of the enhancements Jacada offered. The features such as skipping through screens and combining many screens into one would be very beneficial to the system.

### *1.1.2 General Overview*

Command-driven interfaces and Graphical User Interfaces (GUI) are explained to aid users in understanding the content of this manual.

Command-driven interfaces are also referred to as mainframe systems. This requires users to enter commands from the keyboard to perform actions on what looks like a “green screen.” The user must learn system specific codes and is restricted to keyboard entry only. Examples of Revenue mainframe systems would be CAR, OSCAR, JV, and all the tax databases used throughout the Cabinet.

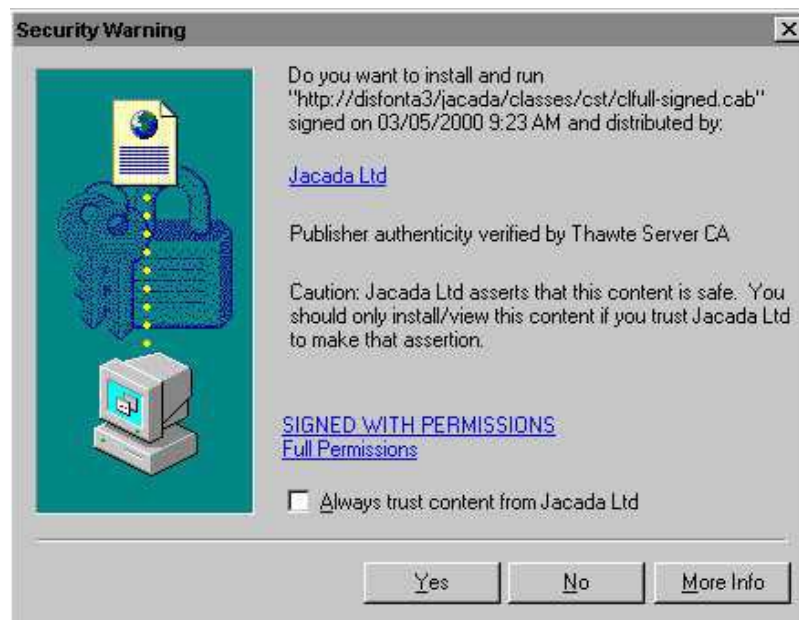
GUIs take advantage of the computer’s graphic capabilities to make the program easier to use. A well-designed interface of this nature can free the user from learning those complex commands as required in the mainframe systems. Terms many to ones, drop down boxes, icons, pushbuttons, checkboxes, and listboxes, are commonly used in this environment and will be covered in this manual.

There will be a brief training session to introduce the new “look and feel” for each system that is converted to the GUI environment. Maneuverability and appearance will be the primary issues detailed in this manual because the original system will remain unaltered.

### 1.1.3 System Features

Any workstation accessing the mainframe through the Jacada server will need to have its system display set to 800 X 600 resolution. A recommended 128 MB of RAM capacity offers the highest optimal performance; however, 64 MB is sufficient for in-house use. Internet Explorer in conjunction with being networked to the mainframe is also required on each workstation to receive the GUI representation of the mainframe systems.

Upon initial entry to the Jacada server, the user will be alerted with a Security Warning message box. Users will need to place a check in the box corresponding to “Always trust content from Jacada Ltd” and click the YES button to install and run the application.



With the approval of the Internal Auditor’s office, command buttons have been added to the GUI screens to skip through a pre-determined number of screens. Committee members reviewed specific screens and flowcharts to determine the acceptable placement of command buttons, screens to be skipped, and the destination screen. Please refer to the Security section of this manual for the internal procedures that each employee must follow when utilizing this feature.

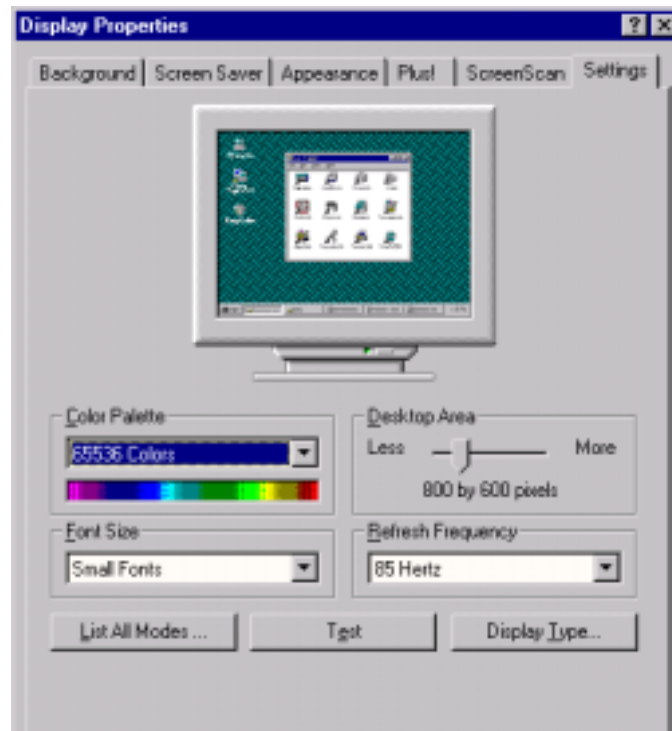
The Tax Detail 1 and 2 screens for all taxes except 11, 61, and 62 will have the skip ability. In order for the system to skip these screens, “Recalculate Liability” defaults have been set on the system generated bills. The default has been set to “N” for Individual Income Tax ONLY. All other taxes will have a “Y” default. Users will need to take precautions when using the skip buttons in the maintenance process because the tax liability will recalculate to zero if there is no amount entered in the Amount Subject to Tax field.

*1.1.3.1. Changing the system resolution to allow for multiple sessions to be viewed concurrently.*

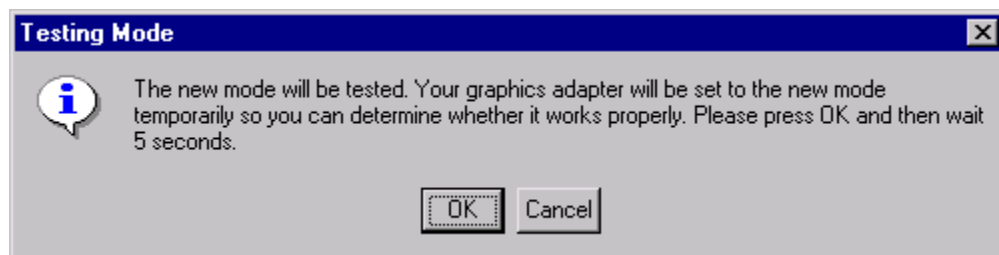
1. Open the Control Panel:
  - Click on Start from the taskbar. Go to Settings, and select Control Panel.
  - When the Control Panel window opens as shown below, double click on the Display icon to open the Display Properties.



- When the Display Properties window opens, go to the Settings tab as shown below.

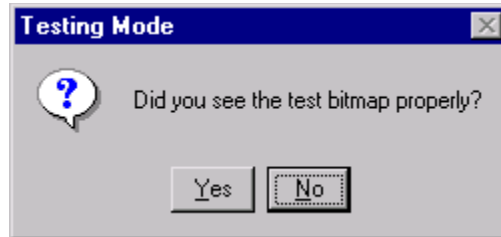


- In the frame labeled Desktop Area, click and hold on the slide bar to move the position to More. This should increase the pixels. It is NOT recommended to go any higher than 1280x1024 as this change will affect the entire system and some applications may not be legible for some users.
- ALWAYS perform the Test before applying this change. Once the Test button is clicked, this message will appear.





- Simply click on OK, and view the monitor as it displays the affect this change has made on your viewing.



- If the appearance of the test is acceptable, click on Yes, and you should be returned to the Display Properties window.
- Click on Apply to change the system resolution. Close the Display Properties window by clicking on OK.

This will allow for a Jacada window to be resized where the entire screen will appear within one window and positioned on the screen to allow for multiple windows to be viewed concurrently. (21' Monitors provide optimum viewing for multiple windows.)

## 1.2 INTRODUCTION

### 1.2.1. Logon

There are two ways to open a KY-NET mainframe session using Jacada. One thing to keep in mind is that opening a KY-NET session using Jacada is the *only* thing that differs from your normal procedures when logging into the mainframe. We'll show you how to open a KY-NET session, or sessions, using Jacada and take it several steps farther to provide a refresher on how to log on and off of the mainframe systems. There are users within the Cabinet who will also need to run a Wygant session for use with the Dialer system. Instructions will be provided for those users as well. Additionally, the differences between the Training and Production regions for our Revenue systems will be emphasized.

- Two ways to open mainframe session using Jacada

There are two icons located on your desktop...one for RevWeb and the other for KRC Applications. The latter provides a centralized location for accessing developments from within the cabinet such as, ELF, Purged Lien Viewer, Corp Code, and some of the PVA systems. Many of the older developments will eventually be accessible here.

#### 1. RevWeb

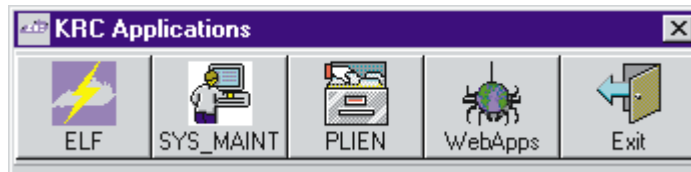


- Double-click on this icon to open the RevWeb home page. On the green bar, click on WEB APPS.

#### 2. KRC Applications



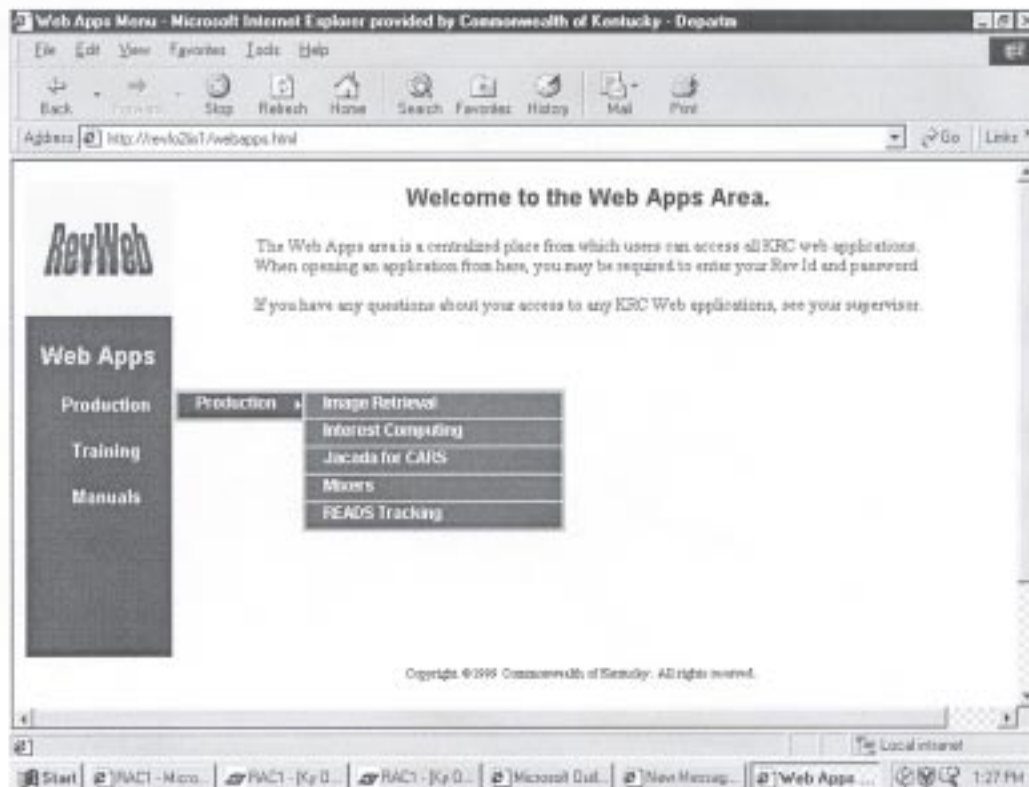
- Double-click on this icon to open the Application toolbar as shown below.



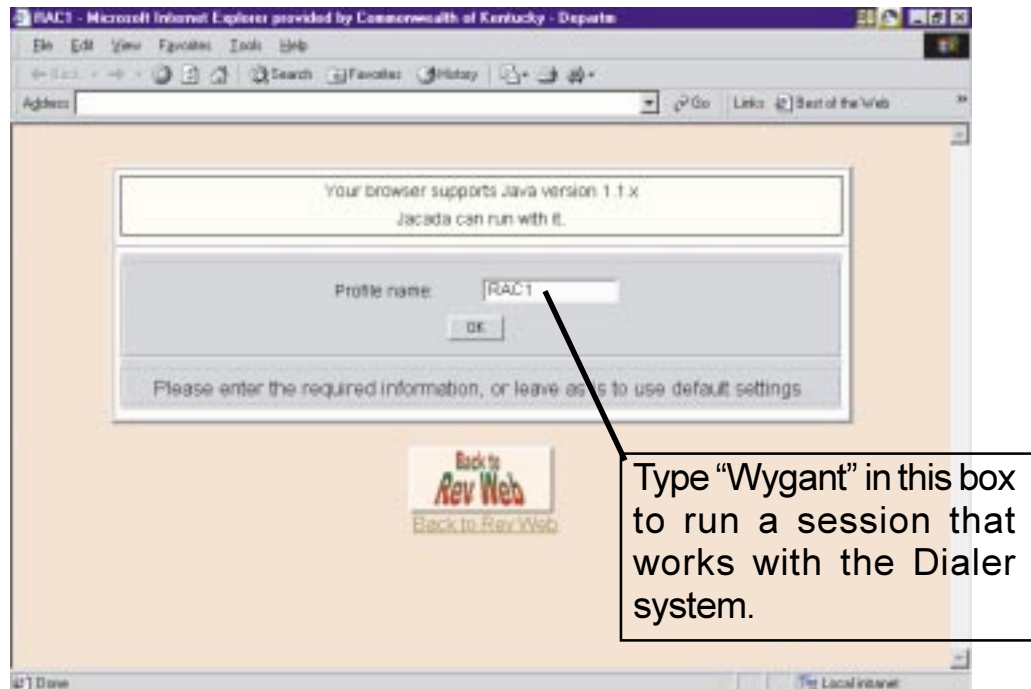
- Click on the WebApps icon to go directly to the WebApps page on RevWeb. If the only system you have access to is RevWeb, then this will open automatically.

Hover your mouse over the \* Production menu and move your mouse to the right to view a submenu. Click on Jacada sessions to open your first window.

\* For the DOIT area—There are two Jacada servers running: one for Development and one for Production. When enhancements and or modifications are made, GOT will place these on the Development server to be tested prior to moving into Production. To open a Jacada session in the Development mode, hover your mouse over the Training Menu, and click on Jacada Development. Regardless of the type of session opened, you can logon to any of the regions within the KY-NET session (IMSTRNG, KYIMS, REVIMS, REVIMS2...)



The first screen to appear will offer a choice of Profiles to use. The default “RAC1” is used for a normal KY-NET session. For those who need to run a Wygant session, the word “Wygant” will need to replace “RAC1” in the appropriate field. Click on Ok to open your first KY-NET session using Jacada.



- Training Session Log On-IMSTRNG

This region is provided for use during training of new employees or new mainframe systems. It is a good way of teaching processes with the Revenue Cabinet or testing modifications and/or enhancements to the existing systems. Security forms can be completed to request access to this region for their employees.

- 1) At the KY-NET logon screen, type your Rev# as the USER.
- 2) Type your mainframe password.
- 3) Press the enter key.  
The Application Selection menu will appear.  
Review the application menu frequently, as new applications are added to the menu, and the Id numbers may change.
- 7) On the command line type the application Id number for **IMSTRNG**.
- 8) Left-click on the OK command button or press the enter key.  
The KYIMS log on screen will appear.

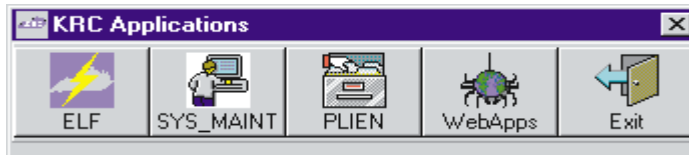
- 9) Type your Rev# as the USERID.
- 10) Type your mainframe password.
- 11) Left-click on the OK command button or press the enter key. A screen accepting the log on will appear.
- 12) Type **/test mfs**
- 13) Left-click on the OK command button or press the enter key. A screen accepting the test command will appear.
- 14) Type **/for revims**
- 15) Left-click on the OK command button or press the enter key.

• Production Log On

- 1) At the KY-NET logon screen, type your Rev# as the USER.
- 2) Type your mainframe password.
- 3) Press the enter key.  
The Application Selection menu will appear.  
Review the application menu frequently, as new applications are added to the menu, and the Id numbers may change.
- 4) Each KY-NET session offers the ability to log on to three (3) IMS applications. Select one (1) IMS application and type that Application Id number on the Command line.
- 5) Left-click on the OK command button or press the enter key.  
The KYIMS log on screen will appear.
- 9) Type your Rev# as the USERID.
- 10) Type your mainframe password.
- 11) Left-click on the OK command button or press the enter key. A screen accepting the log on will appear.
- 12) Type **/for revims**

13) Left-click on the OK command button or press the enter key.

- How to open more than one KY-NET session using Jacada



The KRC Applications Toolbar should still be opened on your desktop. Click on the WebApps button again for each KY-NET session that you want opened. This will open a separate Internet connection for each KY-NET session in order to support the hyperlinks. The RevWeb/WebApps page previously discussed will open and you simply walk through the same steps for each session. When the Jacada window opens and asks for the Profile Name, just type one of the following to set up different sessions:

- RAC 1
- RAC2
- RAC3
- WYGANT

Each KY-NET session offers the ability to log on to three (3) IMS applications.

- To access the second KY-NET session:

- 1) At the KY-NET log on screen, type your Rev# as the USER.
- 2) Type your mainframe password.
- 3) **Type the number 1 in the Secondary Data location.**
- 4) Press the enter key.  
The Application Selection menu will appear.  
Review the application menu frequently, as new applications are added to the menu, and the Id numbers may change.
- 5) Select one (1) IMS application and type that Application ID number on the Command line.
- 6) Press the enter key. The KYIMS log on screen will appear.
- 7) Type your Rev# as the USERID.
- 8) Type your mainframe password.
- 9) Press the enter key. A screen accepting the log on will appear.
- 10) On this screen, you must type the command for the IMS system that you wish to access. The most common command is /for revims.
- 11) Press the enter key. The IMS system menu will appear.

- 12) Press and hold the shift key + PF 11 key to return to the application selection menu.
- 13) Select another IMS application on this same session and type that application ID number on the Command line.
- 14) Press the enter key. The KYIMS log on screen will appear.
- 15) Type your Rev# as the USERID.
- 16) Type your mainframe password.
- 17) Press the enter key. A screen accepting the log on will appear.
- 18) On this screen, you must type the command for the IMS system that you wish to access. The most common command is /for revims.
- 19) Press the enter key. The IMS system menu will appear.
- 20) Press and hold the shift key + PF 11 key to return to the application selection menu.
- 21) Select the third IMS application on this same session and type that application ID number on the Command line.
- 22) Press the enter key. The KYIMS log on screen will appear.
- 23) Type your Rev# as the USERID.
- 24) Type your mainframe password.
- 25) Press the enter key. A screen accepting the log on will appear.
- 26) On this screen you must type the command for the IMS system that you wish to access. The most common command is /for revims.
- 27) Press the enter key. The IMS system menu will appear.
- 28) You are now logged on to all three (3) IMS applications on this session. Press the Page Down button to toggle between the three (3) applications.

• To access the third KY-NET session (if applicable):

- 1) At the KY-NET log on screen, type your Rev# as the USER.
- 2) Type your mainframe password.
- 3) **Type the number 2 in the Secondary Data location.**
- 4) Press the enter key.  
The Application Selection menu will appear.  
Review the application menu frequently, as new applications are added to the menu, and the Id numbers may change.
- 5) Select one (1) IMS application and type that Application ID number on the Command line.
- 6) Press the enter key.  
The KYIMS log on screen will appear.
- 7) Type your Rev# as the USERID.
- 8) Type your mainframe password.
- 9) Press the enter key.  
A screen accepting the log on will appear.
- 10) On this screen, you must type the command for the IMS system that you wish to access. The most common command is /for revims.
- 11) Press the enter key. The IMS system menu will appear.
- 13) Press and hold the shift key + PF 11 key to return to the application selection menu.
- 14) Select another IMS application on this same session and type that application ID number on the Command line.
- 15) Press the enter key. The KYIMS log on screen will appear.
- 16) Type your Rev# as the USERID.



- 17) Type your mainframe password.
- 18) Press the enter key. A screen accepting the log on will appear.
- 19) On this screen, you must type the command for the IMS system that you wish to access. The most common command is /for revims.
- 20) Press the enter key. The IMS system menu will appear.
- 21) Press and hold the shift key + PF 11 key to return to the application selection menu.
- 22) Select the third IMS application on this same session and type that application ID number on the Command line.
- 23) Press the enter key. The KYIMS log on screen will appear.
- 24) Type your Rev# as the USERID.
- 25) Type your mainframe password.
- 26) Press the enter key. A screen accepting the log on will appear.
- 27) On this screen you must type the command for the IMS system that you wish to access. The most common command is /for revims.
- 28) Press the enter key. The IMS system menu will appear.
- 29) You are now logged on to all three (3) IMS applications on this session. Press the Page Down button to toggle between the three (3) applications.

### 1.2.2. Log Off

- To log off the GUI application:

- 1) Left-click on the clear icon on the toolbar or press the Pause/Break key on the keyboard. A blank screen will appear.
- 2) Type **/rcl**
- 3) Left-click on the OK command button or press the enter key. The application selection menu will appear.
- 4) If logged onto three (3) systems, toggle to each one and repeat steps 2 and 3 until no highlighted applications exist.
- 5) Type **logoff** on the Command line.
- 6) Left-click on the OK command button or press the enter key. The KY-NET log on screen will appear.
- 7) Left-click on the close button on the title bar.  
An exit application message box will appear.
- 8) Left-click on the YES button.

### *1.2.3 Security*

The security procedures and guidelines for the Jacada system are the same standardized procedures for the current IMS systems. Users with questions regarding confidentiality and access issues should refer to the KRC Standard Procedures Manual.

#### **Internal Control**

Approval was obtained from the Internal Auditor's office for the navigational enhancements to CARS. The END and I/F/P command buttons are provided only to expedite the approval of audit report maintenance in CARS for specific situations. Providing approvers with the capability to skip screens does not negate the fact that they are responsible for the accuracy of all transactions approved by them. Therefore, approvers should review, when appropriate, any underlying screens (i.e., payments, adjustments, details, etc.) to fully understand what and why they are approving a transaction.

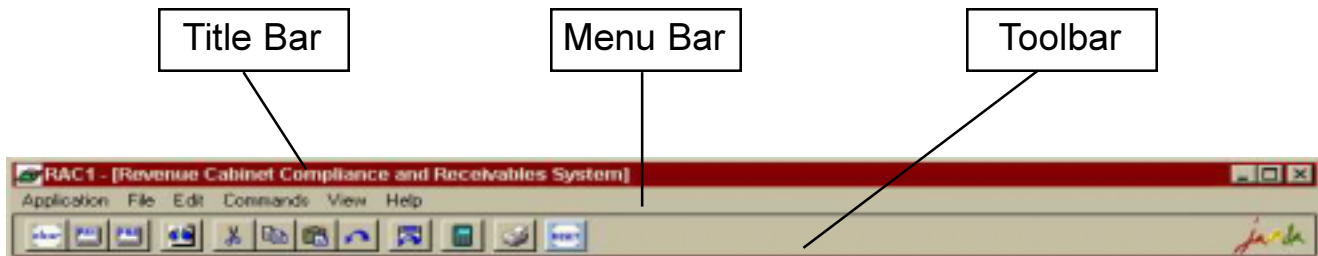
#### **Application Access System**

The Application Access System (AAS) provides additional levels of control for mainframe systems operating under Resource Access Control Facility (RACF) security. RACF gives Cabinet employees inquiry, update or approval access to a database. AAS controls the specific type of update allowed within a particular database, electronically directs the update to the employee's approver, and controls the dollar amount of approval a supervisor can authorize. AAS can control multiple levels of approval and maintains an audit trail of access changes. Any systems interfaced with AAS will retrieve the responsible KRC employee's name and address for on-line information and all taxpayer correspondence.

#### **Confidentiality**

KRC has policies and procedures that govern confidentiality. Each employee shall abide by KRC's policy on confidentiality of state and federal information (Standard Procedure 1.4) when using the system. Statutorily, civil and criminal penalties may be imposed for breach of confidentiality of state and federal information. See KRS 131.190 and KRS 131.990.

## 1.3 NAVIGATION



### 1.3.1 Title Bar

This bar will be highlighted when the window is active. The name of the application and the current document are displayed. At the right end of the bar are icons to minimize, maximize/restore, and close the application. Using the mouse, left-click on one of the icons to select.



Minimizes the window to a button on the taskbar.



Maximizes the window to fill the entire screen.

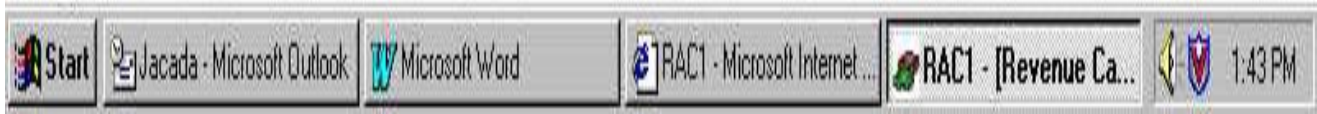


Restores window to its original size. This allows the window to be resized. Jacada sessions will always open in this state.



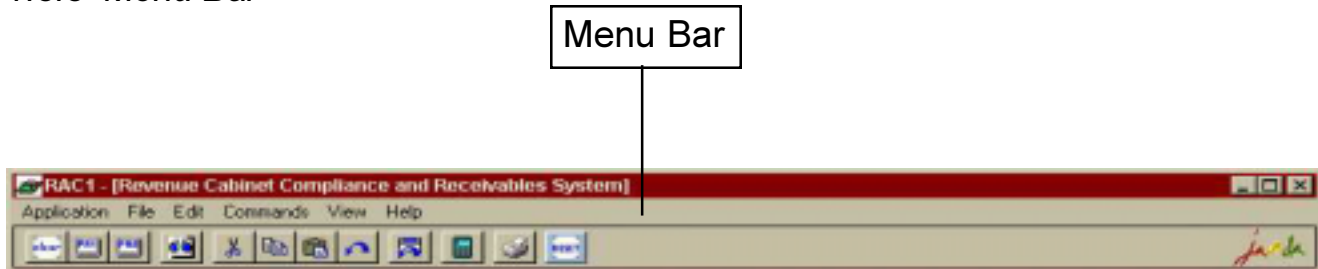
Closes the window and the current application.

### 1.3.2 Taskbar



The taskbar contains the Start button, any open application, and the time of day. You may quickly switch between applications by clicking the button on the taskbar. Using the **[Alt + Tab]** will allow you to switch between applications.

### 1.3.3 Menu Bar



Each word on this bar represents a menu title that provides a drop down menu of commands. Some commands may contain a sub-menu of additional options.

- To select a menu command using the MOUSE:

- 1) Left-click the menu title on the menu bar. A drop down menu of commands will be displayed.
- 2) To choose a command from the menu, move the mouse to that command and left-click.
- 3) To make the drop down menu disappear, left-click anywhere outside the menu.

- To choose a menu command using the KEYBOARD:

- 1) Press the keyboard shortcut to display a drop down menu of commands. **[Alt + the first letter of the menu title]**
- 2) Press the down arrow key to highlight the selected command and press enter.
- 3) If the command contains a sub-menu of options, press the right arrow key to highlight the selected option and press enter.

- Menu titles and the related commands are as follows:

**Application: [ALT + A]**

File:

Exit  
Print GUI  
Print Host Screen

View:

Host Screen

Application:

Run  
Synchronize  
Undo Window

Help:

About

**File: [ALT + F]**

Exit Application [ALT + F4]

**Edit: [ALT + E]**

Undo — *designed for future use*

Cut [CTRL + X]

Copy [CTRL + C]

Paste [CTRL + V]

Refresh Window

Reset [CTRL + R]

Calc [CTRL + L]

Print [CTRL + P]

**Commands: [ALT + C]**

Menu of commands will change based on the screen.

**View: [ALT + V]**

Host Screen  
Window Information

**Help: [ALT + H]**

Contents  
Context Help [CTRL + F1]  
About

### 1.3.4 Toolbar



The toolbar allows you to select commands quickly, without opening a drop down menu. The icons (picture buttons) on this bar represent shortcuts to commonly used commands. To choose a command with your mouse, simply left-click on the icon.

- The icons and their functions are as follows:



**CLEAR**—Will clear the screen for keyboard commands (i.e. - /RCL to logoff, etc.).

To select with the:

- 1) **MOUSE**—Left-click on the icon.
- 2) **KEYBOARD**—Press the Pause/Break key.



**PA1 AND PA2**—Have the same functionality as in the mainframe systems.

To select with the:

- 1) **MOUSE**—Left-click on the icon.
- 2) **KEYBOARD**—Press the Page Up key for the PA1 function or the Page Down key for the PA2 function.



**TOGGLE** — Displays the host screen.

To select with the:

- 1) **MOUSE**—Left-click on this icon to display the host screen. Left-click on this icon again and the host screen will disappear.
- 2) **KEYBOARD**—Press **[ALT + V]**, highlight Host Screen and press enter.





**CUT**—Deletes selected text from its original location. The text may be pasted in another location. When this command is chosen, the paste button becomes activated.

To select with the:

- 1) **MOUSE**
  - A. Highlight the text to be cut by positioning the mouse pointer just before the first character of the text you want to select.
  - B. Press and hold the left mouse button, and drag the mouse pointer to the last character of the text you want selected.
  - C. Release the mouse button.
  - D. Left-click on the cut icon.
- 2) **KEYBOARD**—Highlight the text to be cut and press **[CTRL + X]**.



**COPY**—Creates an exact copy of the selected text to be pasted in another location. The text is not removed from the original location. When this command is chosen, the paste button becomes activated.

To select with the:

- 1) **MOUSE**—Highlight the data to be copied and left-click on this icon.
- 2) **KEYBOARD**—Highlight the data to be cut and press **[CTRL + C]**.



**PASTE**—Functions with the cut and copy commands. This command places cut or copied text in another selected location. This location may even be in another document or application.

To select with the:

- 1) **MOUSE**—Place your cursor where the data needs to be inserted and left-click on this icon.
- 2) **KEYBOARD**—Place your cursor where the data needs to be inserted and press **[CTRL + V]**.



**UNDO**—Designed for future use and currently does not serve a function in this application.



**REFRESH**—Updates the GUI screen to reflect information entered from the host screen.

To select with the:

- 1) MOUSE—Left-click on this icon.
- 2) KEYBOARD—Press **[ALT + E]**.



**CALCULATOR**—Displays a functional calculator on the screen.

To select with the:

- 1) MOUSE—Left-click on this icon.
- 2) KEYBOARD—Press **[CTRL + L]**.



**PRINT**— Produces a print of the GUI screen that was active when this command was executed.

To select with the:

- 1) MOUSE—Left-click on this icon.
- 2) KEYBOARD—Press **[ALT + A]**, highlight file, then highlight either print GUI or print host screen and press enter.

**\*Note**—For both options, the user will need to click on Properties and under page setup, change the orientation to landscape.



**RESET**—Clears the “X System” error message that appears on the host screen.

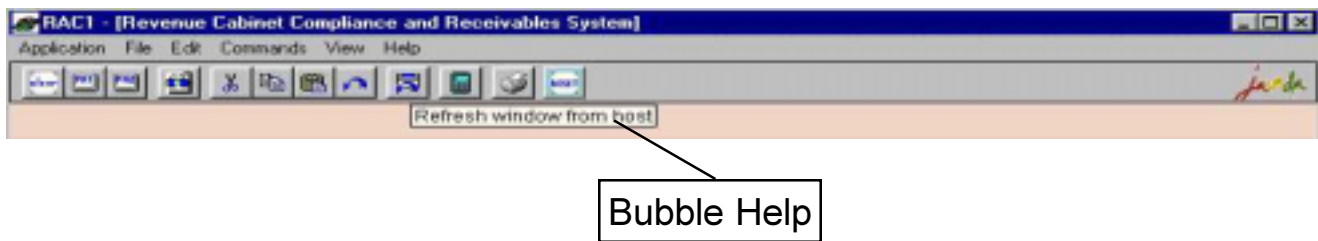
To select with the:

- 1) MOUSE—Left-click on this icon.
- 2) KEYBOARD—Press **[CTRL + R]**.



**JACADA**—Movement within this symbol indicates that the system is clocking.

### 1.3.5 Bubble Help



Bubble help is available for many objects on the screen. It is available for the toolbar and for any checkbox selection in this application. With your mouse, place the cursor on an object on the screen. DO NOT CLICK. If bubble help is available for that object, a small pop-up window (bubble) will appear. The bubble will display help in the form of a brief description of that object's use.

### 1.3.6 One to Many

The screenshot shows a software window titled 'Primary Collection Data Entry'. It features a 'One to Many' layout with multiple tabs. The 'Mailing Address' tab is active, displaying fields for 'Name', 'Address', 'City', 'State', and 'Zip'. Other tabs visible include 'Business Address', 'Case Data', and 'History'. The 'Case Data' tab shows fields for 'Case Type', 'Period', 'Link Act', and 'Del Period'. The 'History' tab shows a table with columns for 'Date', 'Time', 'Status', 'Action', and 'User'. The window also includes a 'Functions' menu with options like 'Update', 'Display', and 'Print', and a 'Status' field showing '100% Collected'.

This feature separates information from a functional or workflow point of view. The One to Many displays the information on separate tabs within the one screen. This allows the screen to be less crowded which provides ample space for Jacada features to be added.

- To select tabs with:
  - 1) MOUSE—Left-click on the tab for that screen.
  - 2) KEYBOARD—Press **[CTRL + TAB]** to move through the tabs.

Refer to page 26.

# One to Many

**Host Screen**

2KPRI PRIMARY COLLECTION DATA XLDC 04/10/01

CASE 000672479- 3 FUNC UPD DISP PRI NEXT CASE 000672479

GRANDMA POLLYS MAIL LIEN (Y/N) Y HOLD DATE 11/16

NANNYS HOUSE VALID STATE H24

ATTN JACKIE HENDRIX ADD COLL ID HTLR

1676 STATE RT 2551 VALID 226 WEST DEPOT ST 051 STATUS N OWN A

ADD GREENVILLE KY 42345 SSN2 000-00-0000

089 TEL1 270 338 0658 NOT MSC AST

BREMEN KY 42325 TEL2 FAX 270 338 0688 MAINT BT

TOTAL DUE NET TAX DUE TOTAL INTEREST TOTAL FEES TOTAL PENALTY

33379.79 17992.20 4421.81 3871.95 7093.83

TT 002\* 010 084\*

P 599,499,\* 299,199,\* 599

L 3394.15 29963.47 18.17

D

I/P DT 04/25/01 ADM: 4.00 LN: 0.00 JA: 1 DEL: 0 FA EX: 11/16/00

THIS NOTE LINE WILL BE IN RED PRINT.

PMT/LTR	DATE	TIME	AC	P	C	RTE	PROMISE 1	PROMISE 2	EX	T	COLL	BALANCE
	04/10/01	0857									XLDC	33379
	04/09/01	1643	DE			H24					DJJJ	33374
	04/09/01	1636	DE			H24					DJJJ	33374
	04/09/01	1631	DE			H24					DJJJ	33374
	04/09/01	1621	DE			H24					DJJJ	33374

PF: 2MEN 3OFF 4NOT 5SEC 6DEL 7HIS 8PRI 9HTX 10NXT 11LKU 13AST 14DEM 15A/R 16PMT

19/025

**RAC1 - Primary Collection Data Zkpi XLDC 04/10/01**

Application File Edit Commands View Help

Case: 000672479- 3 Function: Update Display: PRI-Primary

Next Case: 000672479

Name: GRANDMA POLLYS State: H24-Cold Check

Tel1: 270 338 0658 Status: N Non Operating Hold Date: 11/16

Tel2: 270 338 0688 Coll ID: HTLR Ownership: A Individual

SSN2: 000-00-0000 BT

Indicators: [Notes (PF4)] [Trans Union (PF5)] [Assets (PF13)] [Pending (PF15)]

Note: THIS NOTE LINE WILL BE IN RED PRINT.

Pmt/Ltr	Activity	Place	Contact	Rte	Pmt1/Time/Hold	Promise 2	Ex

Mailing Address: NANNYS HOUSE  
ATTN JACKIE HENDRIX  
226 WEST DEPOT ST  
GREENVILLE KY 42345

Business Address: Henderson - 051

Total Due: 33379.79 Adm: 4.00  
Net Tax Due: 17992.20 Lien: 0.00  
Total Interest: 4421.81 JA #: 1  
Total Fees: 3871.95 Del #: 0  
Total Penalty: 7093.83 FA Ex: 11/16/00  
I/P Proj Date: 04/25/01

Case Data: Tax Type: 002\* 010 084\*  
Period: 599,499,\* 299,199,\* 599  
Liab Amt: 3394.15 29963.47 18.17  
Del Period:

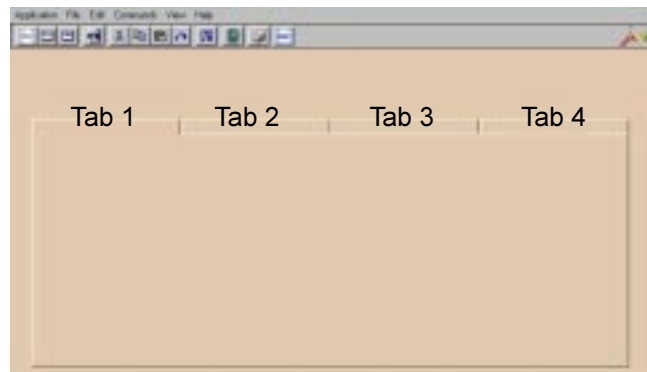
History:

OK 2 Men 3 Off 4 Not 5 Sec 6 Del 7 His 8 Hix 9 Hix 10 Not 11 Lku 13 Ast 14 Dem 15A/R 16 Pmt 17 Ca 18 Bkr 19 Sac

Warning: Apple Window

Start Inbox Mined RE: Ja Unified Microsoft Choice RAC1 8:58 PM

### 1.3.7 Many to One



The Many to One feature brings together screens related one to the other either from a functional or a workflow point of view. The Many to One combines several screens so as to display them as one window. In the window, tabs are used to identify the different screens.

When you access a Many to One, the system must retrieve the information from all of the host screens involved. The system may not necessarily retrieve the host screens in the order for which they appear on the tabs. If you toggle to the host screen from a Many to One and the screen displayed is not the GUI screen, navigate through the host screens until the desired screen appears.

- To select tabs with:

- 1) MOUSE—Left-click on the tab for that screen.
- 2) KEYBOARD—Press **[CTRL + TAB]** to move through the tabs.

- If a particular screen on a Many to One contains a menu of options:

- 1) MOUSE—Left-click on the option you choose; or
- 2) KEYBOARD—Press the tab key to move to the option of your choice and press the enter key.

Refer to page 28.

[illegible][illegible]

```

PAGE#07          STATION NUMBER: 00916401 AND DISTANCE IS 101.00
DATE/TIME       TIME AT 40-01              11:00:38

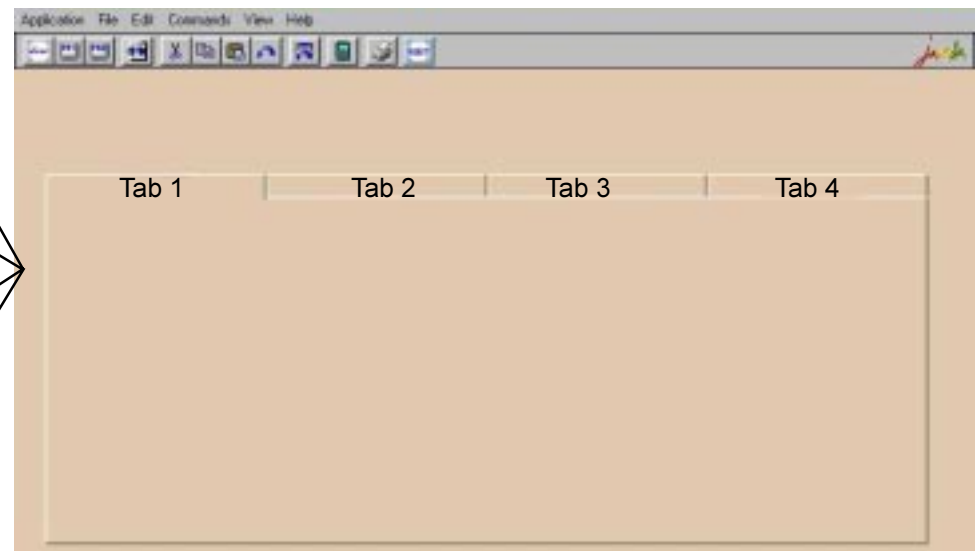
NO. OF SECTION FROM FUNCTION LINE AND PILE LINE
A. FUNCTION NUMBER SECTION

FUNCTION LINE : 
PILE : 3-140 END

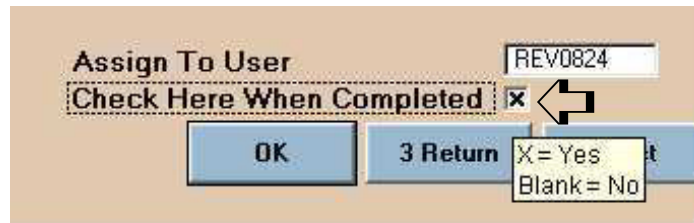
```

[illegible]

## Many to One



### 1.3.8 Checkbox

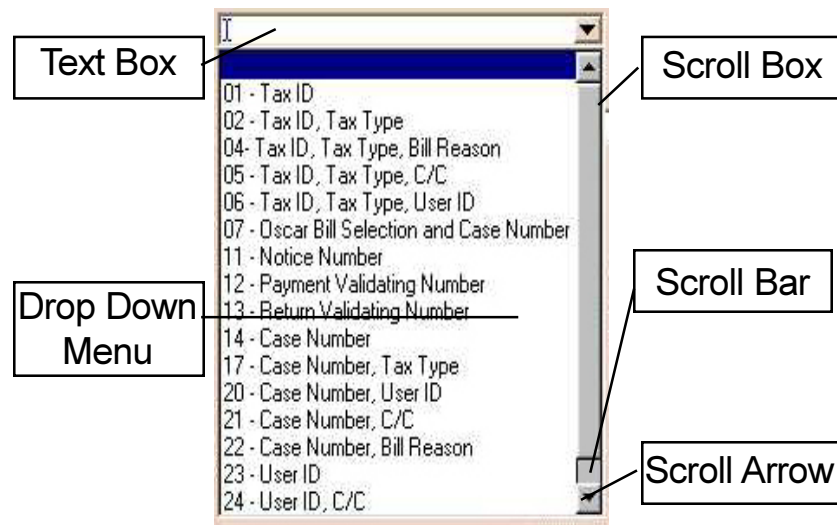


A checkbox is the GUI representation of a mainframe field which requires a yes “Y” or no “N” entry from the keyboard. Placing an “X” in the checkbox represents a “Y” entry. No “X” or a blank box represents an “N” entry.

- To activate/deactivate a checkbox:
  - 1) MOUSE—Left-click on the checkbox that you want to select. To cancel your selection, left-click on the checkbox again.
  - 2) KEYBOARD—Tab to the selection of your choice and press the space bar. To cancel your selection, press the space bar again.



### 1.3.9 Drop Down Menu



Input and output fields will be displayed on the screen as text boxes. For an input field a text box with an arrow button to the right of it will provide a drop down menu of selections for that field. A drop down menu for an output field will only display information. No selection can be made for an output field. The drop down menu may contain a scroll bar. Some of the drop down boxes feature not only a list of options, but also a definition for each option.

- To open the drop down menu using the:

#### MOUSE:

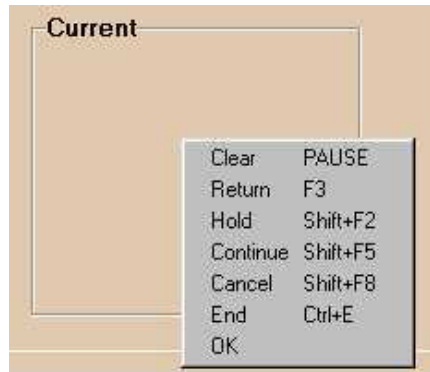
- 1) Left-click on the arrow button to open the menu.
- 2) Use the scroll bar to view all of the options.
- 3) Left-click on the selection of your choice and the drop down menu will close.

#### KEYBOARD:

- 1) Press **[CTRL + down arrow key]** to open the menu.
- 2) Press your up or down arrow keys to highlight your selection.
- 3) Press the enter key to close the drop down menu.

**Scroll Bar**—Often a menu or listbox is not large enough to allow all its contents to be seen. When some of the contents are hidden from view, vertical scroll bars appear at the right side of the menu or listbox. By left-clicking with your mouse on the scroll arrows, located at each end of a scroll bar, you can move the contents up or down. You can also drag the scroll box inside the scroll bar to move through the contents. To drag the scroll box, left-click and HOLD while you move your mouse.

### 1.3.10 Floating Menu



A floating menu is a pop-up menu of choices that appears on the screen at any given location.

- To activate:

- 1) **MOUSE**—Place the mouse anywhere on the screen and right-click once.
- 2) **KEYBOARD**—No function available.

### 1.3.11 Listbox

A boxed area of a window that contains related text arranged in rows and columns with headings is called a listbox. A scroll bar often accompanies a listbox. The selection method will vary depending on the type of listbox presented as outlined below.

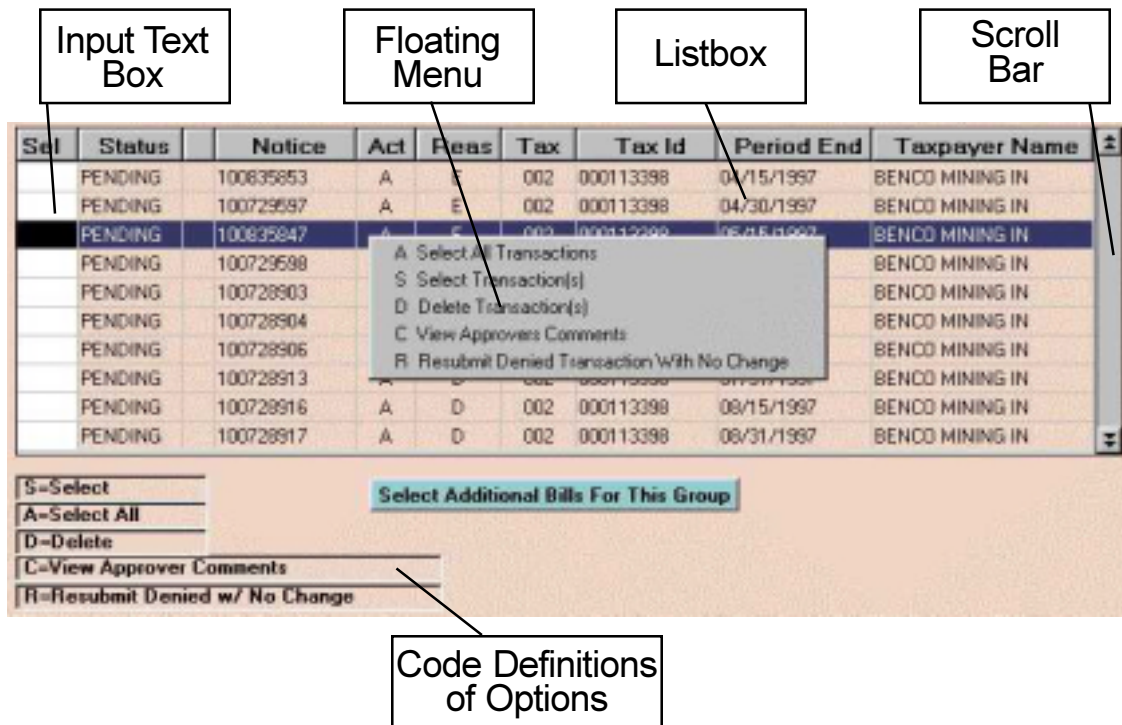
#### 1.3.11.1 Listbox with Checkbox Selection

Sel	Tax	Tax ID	Taxpayer Name	C/C	Program	Rsa	Notice #
<input type="checkbox"/>	001	999000165	G MAN	5	BR RR	W	101318842
<input type="checkbox"/>	001	999000171	G INDIVIDUAL	5	BR RR	W	101318845
<input type="checkbox"/>	001	999000338	G JACK LESIASON	5	BR RR	W	101319103
<input type="checkbox"/>	002	999000009	G BUS	5	BR RR	W	101319001
<input type="checkbox"/>	002	999000329	G JACK'S PLACE	5	BR RR	W	101319105
<input type="checkbox"/>	005	999000154	G B	5	BR RR	W	101318836
<input type="checkbox"/>	005	999000389	G JACK E JILL INC	0	BR RR	F	101319161
<input type="checkbox"/>	006	999000203	G INC	5	BR RR	W	101318885
<input type="checkbox"/>	010	000156143	T ANN BUSINESS CO	5	BR RR	W	101318760
<input type="checkbox"/>	010	000156143	T ANN BUSINESS CO	5	BR RR	W	101318837
<input type="checkbox"/>	010	999000158	G S	5	BR RR	W	101318852
<input type="checkbox"/>	010	999000164	G SALES	5	BR RR	W	101318841
<input type="checkbox"/>	010	999000327	G JACKS MACHINES INC	5	BR RR	W	101319057
<input type="checkbox"/>	011	999000155	G R	5	BR RR	W	101318830

A listbox with checkbox selection presents a group of related choices from which you can select. If an arrow beside the checkbox appears grayed-out, the checkbox is protected and is not available for selection.

- To make a selection from this listbox using the:
  - 1) **MOUSE** — Left-click the checkbox that you want to select. To cancel your selection, left-click on the checkbox again.
  - 2) **KEYBOARD** —Tab to the selection of your choice and press the space bar. To cancel your selection, press the space bar again.

### 1.3.11.2 Listbox with Floating Menu Selection



This listbox presents a floating menu of options. A floating menu of options will be available if there is no drop down arrow button beside the text box. A definition of each option is also displayed on the screen so you can either choose from the menu or type the selection.

- To make a selection from this listbox using the:
  - 1) **MOUSE**—Right-click on a selected row of text to highlight it, right-click on any location of the highlighted row of text to display the floating menu of options. Left-click on the option of your choice.
  - 2) **KEYBOARD**—Tab to your selection, type the letter of the option of your choice, and press the enter key.

### 1.3.11.3 Listbox with Drop Down Menu Selection

Code Definitions of Options

Sel	Tax ID	Tax	Not Num	Case Number	Period	Rsn	C/C	Bal		
▼	999000154	G	005	101318836	999000154005	01/01/97	12/31/97	W	5	Y
				1234 W BUSINESS PARK D				KY	40001	
▼	999000389	G	005	101319161	999000389005	01/01/98	12/31/98	F	0	Y
				JACK & JILL INC	145 DUVALL ST	FRANKFORT		KY	40601	
▼	999000203	G	006	101318889	999000203006	01/01/95	12/31/95	W	5	Y
				INC	7414 W SUCCESSION RD	INC		KY	40601	
▼	000156143	T	010	101318760	000156143010	01/01/99	01/31/99	W	5	Y
				ANY BUSINESS CO	123 NEW STREET	ANY TOWN		KY	40001	
▼	000156143	T	010	101318837	000156143010	02/01/99	02/28/99	W	5	Y
				ANY BUSINESS CO	8230 S WIDGET LN	ANY TOWN		KY	40001	

Drop Down Menu

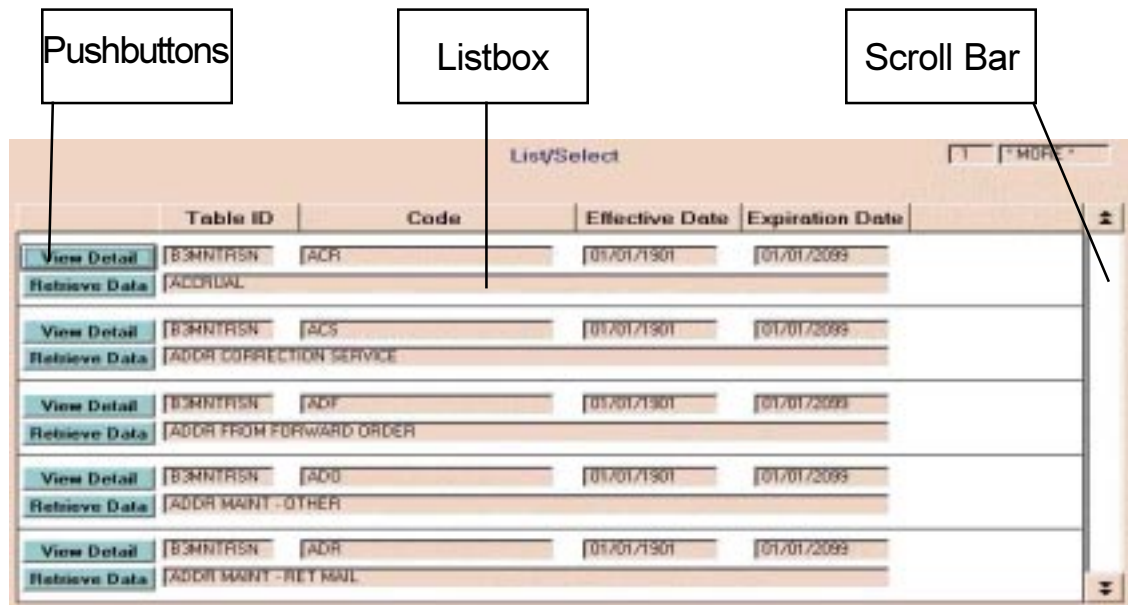
Listbox

Scroll Bar

A listbox with a drop down menu selection presents a textbox with a drop down arrow button to the right of it. When you left-click on the arrow, the drop down menu opens to display a list of options. A definition of each option is also displayed on the screen so you can either choose from the menu or type the selection. If the drop down arrow button appears grayed-out, this field is protected and not available for selection.

- To make a selection from this listbox using the:
  - 1) **MOUSE**—Left-click on the drop down arrow button. Click on the option of your choice and then on the OK command button.
  - 2) **KEYBOARD**—Tab to your selection, type the letter for the option of your choice, and press enter.

#### 1.3.11.4 Listbox with Pushbutton Selection

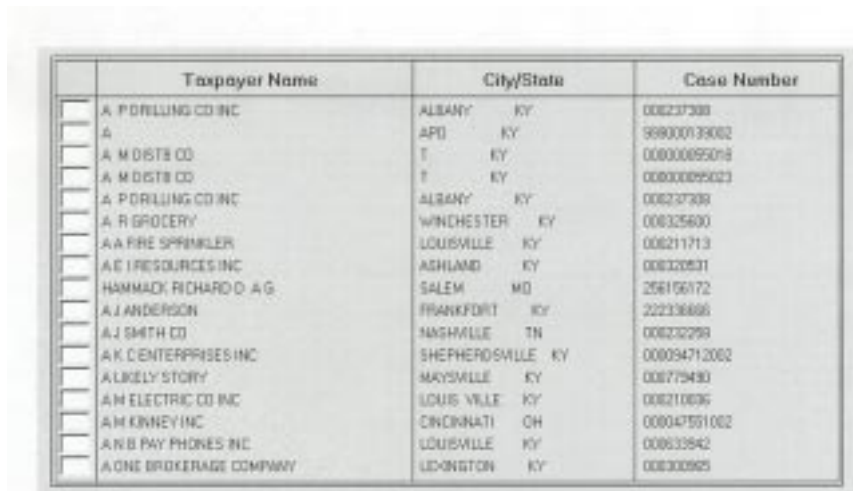


This type of listbox contains pushbutton selections. A listbox with pushbutton selections presents option buttons from which you can choose. When selected, a **pushbutton** performs the function displayed on the button.

- To make a selection from this listbox using the:
  - 1) MOUSE—Left-click on the pushbutton of your choice.
  - 2) KEYBOARD—Press the tab key to move to the pushbutton of your choice and press either the space bar or the enter key.



### 1.3.11.5 Listbox with Line Selection



	Taxpayer Name	City/State	Case Number
<input type="checkbox"/>	A P ORLING CO INC	ALBANY KY	002237300
<input type="checkbox"/>	A	APD KY	999000133002
<input type="checkbox"/>	A M DIST CO	T KY	00000095018
<input type="checkbox"/>	A M DIST CO	T KY	00000095023
<input type="checkbox"/>	A P ORLING CO INC	ALBANY KY	002237300
<input type="checkbox"/>	A R GROCERY	WINCHESTER KY	002325600
<input type="checkbox"/>	A A FIRE SPRINKLER	LOUISVILLE KY	002211713
<input type="checkbox"/>	A E I RESOURCES INC	ASHLAND KY	002320831
<input type="checkbox"/>	HANMACK RICHARD O AG	SALEM MO	256156772
<input type="checkbox"/>	A J ANDERSON	FRANKFORT KY	222336666
<input type="checkbox"/>	A J SMITH CO	NASHVILLE TN	002322998
<input type="checkbox"/>	A K ENTERPRISES INC	SHEPHERDSVILLE KY	000094712002
<input type="checkbox"/>	A LKELY STORY	MAYSVILLE KY	002729480
<input type="checkbox"/>	A M ELECTRIC CO INC	LOUISVILLE KY	002210096
<input type="checkbox"/>	A M KIRKNEY INC	CINCINNATI OH	000047551002
<input type="checkbox"/>	A N B PAY PHONES INC	LOUISVILLE KY	000633842
<input type="checkbox"/>	A ONE BROKERAGE COMPANY	LEONINGTON KY	002300925

This is a type of listbox that contains rows of information from which to make a selection.

- To make a selection from this listbox using the:
  - 1) **MOUSE**—Left-click on any line that you want to select.
  - 2) **KEYBOARD**—Tab to the line selection of your choice and press the enter key.

### 1.3.12 Drop Down Calendars

The screenshot shows a 'Create Interest' form. At the top, there are fields for 'Tax Id' (00000000), 'Tax Type' (000), 'Period' (00000000), and 'Reason' (00). Below these are fields for 'Interest Code', 'Start Date', 'End Date', 'Base Amount', and 'Accrued Interest Amount'. The 'Start Date' field is active, showing a date of 00/00/00. A drop-down calendar is open, displaying a grid of days from 1 to 31. The calendar has a header with 'For A', 'Month', and 'Year'. The 'Month' is set to 00 and the 'Year' is set to 00. The calendar is currently showing the month of 00. The 'End Date' field is also active, showing a date of 00/00/00. Below the date fields, there are fields for 'Interest Credit Amount' and 'Net Interest Amount'.

A date field with an arrow button to the right of it will provide a drop down calendar. The calendar will display a whole month in its entirety. Selecting any one of the days in the calendar places that day inside the date field. Not only can the days of a particular month be displayed, but you may also select any month within a given range of certain years.

#### MOUSE:

- 1) To open the drop down calendar, left-click on the arrow button to the right of the date field.
- 2) To select a particular day, left-click on that day.
- 3) To select a particular month, left-click on the arrow buttons located on the left side of the drop down calendar.
- 4) To select a particular year, left-click on the arrow buttons located on the right side of the drop down calendar.
- 5) To close the calendar, left-click on the X button located on the highlighted bar across the top of the drop down calendar.

#### KEYBOARD:

- 1) To open the drop down calendar, place your cursor at any location inside the date field and press CTRL and either the up or down arrow key on your keyboard.
- 2) To select a particular day, press the left, right, up, or down arrow keys on your keyboard.
- 3) To select a particular month and year, press the page up or page down keys.
- 4) To close the calendar, press either the Esc or Enter key on your keyboard.



### 1.3.13 Hyperlink



An electronic link that opens a document in a separate window.

- To Activate:
  - 1) MOUSE—Left-click on the hyperlink.
  - 2) KEYBOARD—Tab to the Hyperlink and press the enter key.

**Note:** It is recommended that the user close the window after each viewing. If the window is minimized, the only way to reopen it is from the taskbar.

### 1.3.14 Pushbutton



A pushbutton carries out the option displayed on the button.

- To activate:
  - 1) MOUSE — Left-click on the pushbutton
  - 2) KEYBOARD — Tab to the pushbutton and press the enter key.

### 1.3.15 Command Buttons

The large buttons located across the bottom of every GUI screen are called command buttons. A command button will either navigate to another screen or perform the function displayed on that button.

- To choose a command button using the:
  - 1) **MOUSE**—Left-click on the command button of your choice.
  - 2) **KEYBOARD**—Press the tab key to navigate to the option of your choice and then press either the space bar or the enter key. Press **[Shift + Tab]** to navigate in the opposite direction.

### 1.3.16 Definitions of command buttons and pushbuttons are as follows:

**Ad/Chg/DI**—Functions only in the Payment Menu and allows the user to change the amount, the validating number or delete the check from the transmittal.

**Addr**—Navigates to Address Cross Reference screen.

**Adj Sel Lst**—Navigates to Adjustment Selection List screen.

**Appv/Cmts**—Displays a screen to either view or enter approver comments.

**A/R**—Navigates to the Accounts Receivable Display screen within the KY Oscar system.

**Ast**—Navigates to the Responsible Party/Taxpayer Asset Display screen within the KY Oscar system.

**Backward**—If more than one screen of related information exists, navigates back to a previous screen.

**Bkr**—Navigates to the Bankruptcy—Main Menu screen within the KY Oscar System.

**Brr**—Resumes browsing a selected work list in the KY Oscar system.

**Brs**—Starts the process of browsing a selected work list in the KY Oscar system.

**Brw**—Navigates to the Oscar Browse menu screen within the KY Oscar system.

**Cancel**—Cancels the function being performed.

**CAR Menu**—Navigates to CAR menu screen.

**Cii**—Navigates to the Correspondence Image Inquiry Display screen within the KY Oscar system.

**Cil**—Navigates to the Revenue Cabinet Corporation Tax Master/Transaction Maintenance and Inquiry Menu.

**Comments**—Displays a screen to either view or enter comments.

**Complete**—Completes the approval process in the Journal Voucher system without prompting the approver of the option to make revisions.

**Cont**—Navigates to next screen.

**Credits**—Navigates directly to the Display Payments and Credits screen in CAR.

**Cris**—Navigates to the Revenue Cabinet Cross-Reference Index system.

**Del**—Navigates to the Delinquencies and Transactions Display screen within the KY Oscar system.

**Delete**—Removes information or cancels activities.

**Dem**—Navigates to the Demographic Display screen within the KY Oscar system.

**Docket No.**—Navigates directly to a selected correspondence image within the KY Oscar system.

**Down**—If more than one screen of related information exists, navigates to the next screen.

**DR/CR**—(D/C) Displays the Debits and Credits of a Journal Voucher.

**End**—(CAR) Navigates directly to the Total Due screen (last screen of the audit report).

(KY Oscar) Completes a selection made.

**First**—If more than one screen of related information exists, navigates directly back to the first screen without having to return one screen at a time.

**Forward**—If more than one screen of related information exists, navigates to the next screen.

*CARS Payment Menu*—When entering checks and the first screen is full, press enter and then select **forward** if an additional blank screen is needed. If you do not press the enter key or OK button before selecting forward, the information entered will be lost!

**Grp Canc**l—Cancels all selected audit reports in that particular group.

**Help**—Provides additional help for the screen presented.

**His**—Navigates to the Collections History Text screen within the KY Oscar system.

**Hold**—Places selected function on hold.

**Htx**—Navigates to the Enter History Text screen within the KY Oscar System.

**I/F/P**—Navigates directly to the Interest/Fees/Penalty Summary screen.

**IIT**—Navigates to the Revenue Cabinet Individual Income Tax Inquiry Menu.

**JV Menu**—Navigates to the Journal Voucher Menu screen.

**KYIMS**—Navigates to the On-line IMS main menu (see Revenue Menu-KYIMS)

**List**—Navigates to pending selection list screen.

**Lku**—Navigates to the Secondary Search screen within the KY Oscar system.

**Menu**—Navigates to the Menu screen within that system.

**MIXER**—Navigates to the Miscellaneous Taxes Registration system.

**Next (Next Selection)**—Navigates forward to the next selection in the group.

**Nxt**—Navigates to the next case within the KY Oscar system.

**NOT**—Navigates to the Collection Notes Display screen within the KY Oscar system.

**Off**—Logs off the KY Oscar system.

**OK**—Usually will only update or refresh the information on the GUI screen.  
—On a few select screens, will allow the user to navigate (continue) to the next screen.

**OSCAR**—Navigates to KY OSCAR menu.

**Page**—Navigates within the KY Oscar system to asset resources for responsible parties.

**Pmt**—Navigates to the payment Instructions Sheet within the KY Oscar system.

**Prop Tx**—Navigates to the Commonwealth of Kentucky Property Tax message system.

**Prev**—Navigates back to the previous selection in the group.

**Primary**—Navigates from the Secondary Collection Data screen within the KY Oscar system to a cross-reference case.

**Print**—Functions only in the *CARS Payment Menu* to print a document that is attached to the cold check for filing purposes.

**Release**—Functions only in the *CARS Payment Menu* to release unhonored check transmittal for processing.

**Return**—Returns to the screen previously viewed.

**Rev Menu**—Navigates to the Revenue Cabinet IMS main menu.

**Save**—Functions only in the *CARS Payment Menu* to place changes on hold if you exit the program.

**Sas**—Navigates to the Secondary Assignment Display screen within the KY Oscar system.

**Search**—Functions only in the *CARS Payment Menu* to locate an address.

**Sec**—Navigates to the Secondary Collection Data screen within the KY Oscar system.

**Select Bills**—Navigates to a screen for bill or delinquency selection within the KY Oscar system.

**Skip**—In the *CARS Billing Menu* will navigate directly to the Total Due screen (last screen of the audit report). In the *CARS Maintenance Menu* will navigate directly to Tax Detail 2 for Individual Income Tax **ONLY**.

**SU**—Navigates to the Revenue Cabinet Sales and Use Tax Main Menu.

**Submit**—Sends data entered for approval in the Journal Voucher system without prompting the user of the option to make revisions.

**Summary**—Displays a summary of information within a system.

**Swap**—Navigates between the new and current adjustment screens.

**Tax R/A**—Navigates to the Tax Receipt Account information in the Journal Voucher system.

**Tmu**—Navigates to the KCATC Table Maintenance Menu screen within the KY Oscar system.

**Transmit**—Functions only in the *CARS Payment Menu* to navigate to the Listing of Unhonored Check Transmittal screen.

**Top**—Navigates to the top of data list.

**UP**— If more than one screen of related information exists, navigates back to previous screen.

**Val Sel**—Functions only in the *CARS Payment Menu* to navigate to the Validating Number Selection List screen.

**View Alert**—Navigates to the Alert Display screen within the KY Oscar system.

**WH**—Navigates to the Revenue Cabinet Withholding Tax Main Menu.

**ZKMEN**—Navigates to the KY Oscar Main Menu screen.

**ZKPRI**—Navigates to the Primary Collection Data screen within the KY Oscar system.

### 1.3.17 Using the Mouse

As you move your mouse, a small arrow on your screen also moves. This arrow is called the *mouse pointer*. The shape of the mouse pointer changes from time to time, but when you are selecting objects, it appears as a small arrow.

To use your mouse, place the mouse on your mouse pad. Hold the mouse with your right hand with your fingertips resting on the mouse buttons. Keep the mouse on the worktable surface.

Slide the mouse around on the mouse pad. As you slide the mouse, the mouse pointer moves on your screen. If you slide your mouse off your mouse pad, pick the mouse up and set it back down in a more convenient place. The mouse pointer remains in the same screen position while the mouse is in the air as long as the trackball located in the mouse's "stomach" is not moved.

**Click or Left-click**—Press and release the left mouse button once quickly. Often used to choose a menu or select an item.

**Double-click**—Press and release the left mouse button twice in rapid succession. Often used to select program icons.

**Drag**—Press the left mouse button and hold it while moving the mouse, and then release it when the mouse pointer is in the desired position. Often used for selecting or moving text.

**Point**—Move the mouse pointer until it is touching an item on the screen. Used to position the mouse pointer on an item before performing an action.

**Right-click**—Press and release the right mouse button once. Often used to open floating menus.

If you have trouble using the mouse, you need to practice the clicking movement. You can also change the speed of the double-click to better suit your "trigger" finger.

You usually use the left mouse button to perform actions with the mouse. If you prefer a "left-handed" mouse, you can switch the mouse buttons and work with your left hand on the mouse. If you do switch the mouse buttons, remember to press the right button when directions tell you to press the left button.



### 1.3.17.1 Changing Your Mouse Settings:

- If you want to change the configuration of your mouse:
  - 1) From the desktop, open the Start menu and choose *Settings* and then *Control Panel*.
  - 2) In the Control Panel window, double-click the *Mouse* icon to open the Mouse Properties dialog box.
  - 3) Adjust the settings.
  - 4) Select OK or press Enter to accept the changes you have made. Select Cancel or press Esc to close the dialog box without saving changes.



## **APPENDIX 1–Discrepancies**

### **A. Instructions for Handling Error Messages**

Jacada will display the same error messages that occur in the IMS Mainframe system(s).

- Error messages specific to Jacada:

1. “Keyboard locked.” If this occurs remove the error message box by left-clicking on OK inside that box.
2. “Double-click selection is not available.” This error may occur if you double-click to make a selection in a list box. Remove the error message box by left-clicking on OK inside that box.
3. “X-system” – If Jacada is not responding, the host screen may have this error message displayed on the status line. Click on the reset icon on the menu bar or toggle to the host and press the ESC key from the keyboard.

### **B. How to Report Problems**

Please follow these procedures when experiencing problems with Jacada:

1. Explain the problem by completing the Jacada Discrepancy Report Form. Complete all areas to provide as much information as possible.
2. Make screen prints whenever possible.
3. Fax the Jacada Discrepancy Report along with any screen prints to 502-564-9571.

For additional assistance, please contact designated personnel within your area or the Dept. of Information Technology at 564-9382.

Department of Information Technology  
Kentucky Revenue Cabinet  
200 Fair Oaks Lane  
Frankfort, KY 40620  
Phone 502-564-9382  
Fax #: 502-564-9571

Screen Name/Number: \_\_\_\_\_ Case #: \_\_\_\_\_

## This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

48

## APPENDIX 2–Commonly Asked Questions

**Question:** What is Jacada?

**Answer:** Jacada is the name of the company that has provided KRC with the software to convert our mainframe systems to a more user-friendly GUI environment.

**Question:** What is a GUI and how does it make it more user-friendly?

**Answer:** A Graphical User Interface (GUI) pronounced “gooey” brings a more windowed environment to our applications. Features, such as “point and click,” pushbuttons, skip buttons, and on-screen code descriptions eliminate the user’s need to learn complex codes to enter in mainframe systems.

**Question:** Will Jacada be better than the IMS systems?

**Answer:** Jacada offers enhancements to the mainframe systems rather than replacing it. Users may experience slow response from the mainframe whenever code level help is accessed and there are several pages for the user to scroll through. System performance should improve through the use of drop down boxes where the code descriptions will now be displayed within the contents of one drop down box. Thus, eliminating the need to navigate out to another screen.

**Question:** When utilizing the GUI, will correspondence sent to taxpayers be in a different format than in the other mainframe systems?

**Answer:** No.

**Question:** What changes if any will the *taxpayer* notice in Jacada?

**Answer:** There will be no visible changes.

**Question:** Is Jacada part of KRC’s plan for an integrated tax system?

**Answer:** Jacada, while not being a part of the integrated tax system, is providing a similar look and feel to system screens that may aid in the development of the integrated tax system.

**Question:** How is the host accessed from the GUI screen?

**Answer:** The host screen may be accessed by using either your mouse or the keyboard.

MOUSE:

- 1) On the tool bar left-click on the TOGGLE icon or
- 2) On the menu bar left-click on *View*, then left-click on the *host screen*.

KEYBOARD:

- 1) Press [ALT + V], highlight *Host Screen* and press enter.

**Question:** Can I continue to use the mainframe rather than utilizing the GUI?

**Answer:** Yes. However, use of the GUI screens is highly recommended since the Revenue systems will be converted to this type of environment.

**Question:** Can I work from the host screen while in Jacada?

**Answer:** You may view the host screen at any time, although it is not recommended that data be entered from the host. There will be no GUI screen if you navigate to a system that has not been converted, and data will have to be entered on the host.

**Question:** Will an employee be required to obtain security authorization to access the server?

**Answer:** No; however, refer to Security and Logon sections of this manual for KY-NET authorization.

**Question:** Whom do we contact if we have problems or questions about Jacada?

**Answer:** You should contact the Department of Information Technology, Application Analysis and Support Group, at 564-9352.

**Question:** What is the next step for Jacada?

**Answer:** Conversion of the IMS systems from a mainframe environment to a GUI environment will continue.

**Question:** Do you anticipate significant down time in Jacada?

**Answer:** No. Jacada runs off a dedicated server; however, works dependently off the host mainframe systems. Thus, Jacada will not be available whenever the mainframe systems are down.

**Question:** How do I exit the Jacada system?

**Answer:** Please refer to the Logoff section of this manual.

**Question:** Can the keyboard be used in Jacada instead of the mouse?

**Answer:** There is keyboard functionality throughout the GUI screens. Reference Keyboard Use for each system feature in this manual. Later versions of the Jacada software will offer enhancements to keyboard access and currently users may find that using their mouse is quicker.

**Question:** Does Jacada have a spell check function?

**Answer:** No.

**Question:** Does Jacada have word wrap?

**Answer:** No.

**Question:** In Jacada for CARS, how can you tell if there is maintenance pending on an audit report?

**Answer:** If the Selection feature on the listbox appears protected, neither mouse nor keyboard can make a selection. This replaces the asterisk (\*), which is displayed in the CAR mainframe system.

**Question:** Can I change the colors of my screen and the keyboard mappings?

**Answer:** The background colors and the keyboard mapping of the GUI screen cannot be changed. However, changing your system's desktop settings will affect the color of certain areas in the application.

## APPENDIX 3—Index

AAS .....	16
Bubble Help .....	24
Changing Your Mouse Settings .....	47
Checkbox .....	29
Command Buttons .....	40-44
Copy/Cut .....	20, 22
Drop Down Calendars .....	37
Drop Down Menu .....	30
END .....	41
Floating Menu .....	31
Green Screens .....	2
GUI .....	2, 3
Host Screen .....	49
Hyperlink .....	38
Icons .....	17, 21, 22, 23
I/F/P .....	42
Listbox With:	
Checkbox Selection .....	32
Drop Down Selection .....	34
Floating Menu Selection .....	33
Pushbutton Selection .....	35
Line Selection .....	36
Logoff .....	15
Logon .....	7-14
Mainframe .....	1, 2
Many to One .....	27, 28
Maximize .....	17
Menu Bar .....	19, 20
Menu Titles .....	20
Minimize .....	17

Navigation .....	17-46
One to Many .....	25, 26
Paste .....	20-22
Print .....	43
Pushbutton .....	39
Recalculate Liability .....	3
Refresh Window .....	20, 23, 43
Restore .....	17
Scroll Bar .....	30
Security .....	16
Security Warning .....	3
Taskbar .....	18
Title Bar .....	17
Toggle Icon .....	21
Toolbar .....	21
Undo .....	22
Using the Mouse .....	45, 46